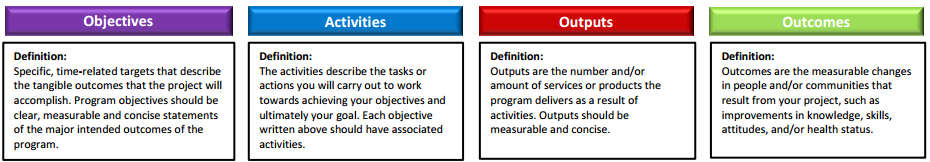
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**Projects Resource Planning**

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| **Document Information** | |
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| **Date and version** | 27 January 2016 – version 0.1 |
| **Change Description** |  |



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|  | | **Projects Resource Planning** | |
| 1. **Projects Resource Planning** | |
| **The Challenge / Problem Statement** | | | |
| We are currently unable to produce a combined resource forecast for active projects. As a result of this, we are unable to identify potential resource bottlenecks in the future and proactively address these through a combination of, for example, interim resourcing and training activities. This means that we are only able to deliver reactive, short-term solutions to resource problems as they arise, which leads to delays in certain project whilst we wait for the resource bottleneck to pass. | | | |
| **Intended Outcome** | | | |
| At the end of this piece of work the Projects team will be able to proactively identify resourcing issues affecting active projects on a rolling 6-month basis and establish action plans to address these. This will be enabled by Project Managers (PMs) producing a 6-month resource plan for each of their projects on a monthly basis and these being combined, i.e. by the PMO, to give an overall 6-month view of resource requirements for all active projects. The resource plans will include:   * 3-month ‘hard’ view – a resource plan from month 1 to month 3 showing committed resources agreed with Resource Management/relevant managers * 3-month ‘soft’ view – a resource plan from month 4 to month 6 showing the resources required to deliver during this period * sufficient detail in terms of resources to be able to identify bottlenecks, skills gaps, etc. in IT Services (e.g. ‘Java Developer’ as opposed to ‘Developer’) * the combined resource plan will include a baseline figure of existing resources and an indication where resources will be overloaded   The Projects Leadership team will review the combined plan on a monthly basis to identify any potential resource bottlenecks and to develop an action plan to address these.  There will be appropriate resources in place to enable PMs, the PMO and the Projects Leadership Team to carry out this work (e.g. standard templates, user guides, etc.) and all relevant staff will have been trained in how to produce/review resource plans. There will also be a mechanism to enable new staff joining the University to understand how we do resource planning and to engage in the planning process. | | | |
| **Objectives (SMART)** | | | |
| In order to deliver the outcome this piece of work must deliver:   1. a list of target projects to pilot approach (e.g. priority projects identified in January 2016) by end of January 2016 2. a list of issues/barriers preventing PMs from producing resource plans and solutions to these (or appropriate escalation) by April 2016 3. 3-month ‘hard’ resource plans for the target group of priority projects by the end of April 2016 4. 3-month ‘soft’ resource plans for the target group of priority projects by the end of April 2016 5. a combined 6-month view of resource requirements for the target group of priority projects by the end of May 2016 6. a feedback/review process in place to respond to resource bottlenecks in the 6-month combined resource plan by the end of May 2016 7. rolled out the approach out across Projects by the end of July 2016 | | | |
| **Output(s) / Delivery** | **Key Outcome(s) / Key Metrics** (end state) | | |
| Bottom-up list of barriers to delivering resource plans and action plan to address | 6-month resource plan | | |
| Individual resource plan template and standards | 6-month resource plan | | |
| Individual resource plan process and guidance | 6-month resource plan | | |
| Combined resource plan template and standards | 6-month resource plan | | |
| Combined resource plan process (incl. ownership) and guidance | 6-month resource plan | | |
| Feedback/review process (body, members, process and guidance) | Action/response plan | | |
| User guide to resource planning (individual, combined and review approach) | 6-month resource plan and action/resource plan | | |
| Training in new approach | 6-month resource plan | | |
| Updated induction guide (overview of approach with links to resources) | 6-month resource plan | | |
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| **Key Milestones / Activities** | | | **Completion Date** |
| * Identify barriers to producing resource plans and develop action plan to overcome these | | | 31-Mar-16 |
| * Completion of actions to address barriers or escalate to ITLT member(s) | | | 30-Apr-16 |
| * Individual resource plan approach completed | | | 30-Apr-16 |
| * Combined resource plan approach completed | | | 31-May-16 |
| * Feedback/review process established | | | 31-May-16 |
| * User roll-out of approach across Projects | | | 31-July-16 |
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| **Resource(s) / Expected Cost** | | | |
| * Portfolio Manager – FOC (Internal resource) * Project Manager (Process Improvement) – FOC (Internal resource) * PMO Analyst – FOC (Internal resource) * IT Project Manager (for pilot projects) – FOC (Internal resource or funded by active projects) | | | |

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| **Managing top 3 risk** | |
| **Risk** | **Mitigating Action** |
| * Project Managers for the pilot projects are too busy to engage in improvement work | * Ensure workshops are short and focused on action to minimise impact on staff time * Ensure work is visibly sponsored by the Head of Projects and is mandated as a ‘must do’ activity |
| * Barriers to producing resource plans are outside of the control of Projects to resolve | * Escalation of issues to the Head of Projects/ITLT for resolution |
| * Internal resources not available to produce the outputs defined above | * Ensure agreement with relevant managers to ensure that resources can be made available. In principle agreement already obtained from Ian Coop, PMO Manager, to have some PMO Analyst time (Jacinta Blythe) and from CMPI to have some Project Manager time (Cath Dyson) |
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| **Dependencies** | **Related Project Code / Workstream Reference** |
| * Requirement to understand existing resource availability in terms of the resource units defined by this work stream, e.g. numbers of permanent Java Developers as opposed to Developers. | * Demand Management stream led by Sarah Garland |
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